



USDA Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Template Version 2.09

Required Report - public distribution

Date: 9/14/2006

GAIN Report Number: TU6038

Turkey

Livestock and Products

Annual

2006

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Report Highlights:

Despite the government programs to assist producers, the Turkish livestock sector continues to struggle. The restrictive import regime and the high production costs, which are primarily due to high feed costs, create obstacles for development of the sector. Although various types of support programs have been announced in recent years, most of these have been social rather than economic programs. Turkey maintains a restrictive import policy allowing only imports of dairy and beef breeding cattle from non-BSE countries. Therefore, Turkey allows imports of breeding cattle from only three countries. Despite the demand for high quality beef in Turkey, the GOVERNMENT does not permit imports of beef or veal in order to protect its domestic industry.

Includes PSD Changes: Yes
Includes Trade Matrix: No
Unscheduled Report
Ankara [TU1]
[TU]

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Executive Summary

Despite government programs to assist producers, the Turkish livestock sector continues to struggle from declining cattle inventories and a restrictive import regime that limits access to breeding cattle. At the same time, high feed costs increase the cost of production. Each new Turkish government has announced some type of support program although most were social rather than economic programs. Due to a stable increase in population, consumption of beef remains rather steady despite price increases. Turkey maintains a very restrictive import policy allowing only imports of dairy and beef breeding stock. As way of protecting its domestic industry, the government does not permit the importation of beef or veal despite demand for high quality beef, particularly from the tourism industry.

The most significant problem of the livestock sector in Turkey is animal nutrition, which makes cattle more susceptible to diseases. Rations are often inadequate and expensive. Most livestock generally are grazed on public lands on a first-come first-serve basis and are provided with little or no additional supplements. Efforts to support crop production have resulted in domestic grain prices that are considerably above the world market prices.

Declining meat supplies have significantly increased meat prices in recent years. Higher profits have attracted investments in the sector. Large private sector entities have tried to establish commercial farms primarily for dairy production along with some feedlots in the western parts of the country. These investments have increased interest in U.S. livestock genetics in recent years.

Turkey maintains very restrictive import regulations for live animals, allowing imports of dairy and beef breeding cattle from only three countries, Uruguay, Australia and New Zealand. U.S. exports to Turkey were banned in December 2003 due to the BSE incident in the State of Washington. USDA and the veterinary authorities of the Turkish Ministry of Agriculture agreed on a health certificate that imports of breeding cattle would be possible from those states that were free from BSE. However, Turkish authorities did not remove the ban after the EU grouped the United States as a Category 3 country since Turkey has begun adopting the EU regulations.

Since imports of live animals from the EU countries are also banned due to BSE, Turkey is having difficulty finding high-quality breeding cattle to import. In order to import breeding cattle from Uruguay, Turkish officials had to change its requirements. Turkey imported 955 pregnant heifers in 2005 and an additional 412 pregnant heifers in January and February 2006 from Uruguay. Turkey stopped breeding cattle imports from Sweden on March 7, 2006 due to a BSE incident in this country. Importers can import breeding cattle only from Australia and New Zealand in addition to Uruguay now. The government allows the imports of breeding cattle and livestock genetics with zero import duty.

Turkey imports significant quantities of tallow primarily for soap production. The United States has been a major supplier of tallow providing more than 90 percent of demand.

Cattle Production

Turkey's cattle inventories are projected to continue to decrease in MY 2007 even though the GOVERNMENT is providing support programs to the sector. However, the programs are encouraging individual farmers, especially larger companies to invest in the sector in order to improve yields.

Turkey has a rather large number of cattle; however, the majority of cattle in Turkey are low yielding local breeds, which are grazed on pastures and meadows. The average farm size (about 6 Ha) and herd size (about 5 cows) have limited improvements. Turkey's growing human population and improvement in the economic sector, especially in the tourism industry, have increased the demand for meat and milk. This has encouraged investment in modern dairy farms and feedlots. Larger investors have established larger commercial farms mostly in the western and central regions. Most dairy and beef production (estimated to be about 75 percent) is still done on small farms. Per capita consumption of milk and milk products is estimated around 150 liters and beef consumption is estimated about nine kilograms in Turkey.

Recent Turkish governments have encouraged owners of larger farms to import breeding cattle. However, only those farmers who have at least 100 head can receive permission to import. Data on herd size is not published, but probably no more than 10 percent of producers meet this criterion. Milk and meat yields on these farms are generally higher than the norm since they can provide better management and health care. Nationwide average milk yield is estimated about 2,000 MT per cow and carcass beef yield is estimated nearly 170 kilograms per cattle in Turkey. Milk yields are estimated around 4 MT and carcass beef yield is estimated around 300 kilograms on more modern farms.

Investments in the dairy sector have increased in recent years due to higher milk prices. The prices producers receive vary a lot depending upon the quality and amount supplied. Milk prices also vary a lot throughout the year. They are relatively low in the spring and summer but high in the fall and winter. Smaller farmers receive lower prices due to the lower milk quality on their farms. Smaller farmers usually sell mostly to local yogurt and cheese processors since larger processors are not interested in collecting milk from these farms. Milk prices currently are between YTL 0.45 and YTL 0.53 per liter depending upon the quantity, quality, and availability of the cooling tanks. Small producers are currently receiving about YTL 0.45 (USD 0.30) per liter while large commercial farms are receiving about YTL 0.53 (USD 0.35) per liter because they can produce high quality milk cooled in cooling tanks with steadily larger quantities. These prices are higher than they were a year ago (YTL 0.35 and YTL 0.45 per liter, respectively) even though they have not been changed since last January 2006.

The government is also providing premiums to milk producers. Milk producers receive YTL 0.055 premium per liter if they sell their milk to modern processing facilities and if they are members of official producers organizations and only YTL 0.03 per liter if they are not members. Milk producers also receive YTL 0.015 per liter additional premium if they have registered cattle.

Turkey's beef sector has not developed as well as its dairy sector. Specialized beef breeds are not yet popular in Turkey. Although Angus, Hereford and Simmental breeds were imported under USDA's Quality Sample Program several years ago, they have not gained in popularity. Dual-purpose animals, such as Brown Swiss, are very common. Beef quality is not considered high and supplies are inadequate particularly for Turkey's five star hotels and its growing tourism sector.

Turkey vaccinates for Foot and Mouth disease in all parts of the country except the Thrace region, which has been declared free of Brucellosis and Tuberculosis and which receives support from the government to maintain that status. Turkey's geographic locations, and uncontrolled animal movement particularly in the East and Southeastern borders and especially during the religious holidays, are the primary reasons for the spread of diseases among livestock in Turkey.

PSD Table for Cattle

Turkey Animal Numbers, Cattle							
	2005 USDA Official [Old]	Revised Post Estimate [New]	2006 USDA Official [Old]	Estimate Post Estimate [New]	2007 USDA Official [Old]	Forecast Post Estimate [New]	UOM
Market Year Begin		01/2005		01/2006		01/2007	MM/YYYY
Total Cattle Beg. Stks	10500	10500	10300	10300	10100	10100	1000 HEAD
Dairy Cows Beg. Stks	3850	3850	3750	3750	0	3700	1000 HEAD
Beef Cows Beg. Stocks	2900	2900	2850	2850	0	2800	1000 HEAD
Production (Calf Crop)	3800	3800	3700	3700	0	3650	1000 HEAD
Intra EC Imports	0	0	0	0	0	0	1000 HEAD
Total Imports	2	2	0	2	0	0	1000 HEAD
TOTAL Imports	2	2	0	2	0	0	1000 HEAD
TOTAL SUPPLY	14302	14302	14000	14002	10100	13750	1000 HEAD
Intra EC Exports	0	0	0	0	0	0	1000 HEAD
Total Exports	0	0	0	0	0	0	1000 HEAD
TOTAL Exports	0	0	0	0	0	0	1000 HEAD
Cow Slaughter	0	0	0	0	0	0	1000 HEAD
Calf Slaughter	1950	1950	1900	1900	0	1850	1000 HEAD
Other Slaughter	1900	1900	1850	1850	0	1800	1000 HEAD
Total Slaughter	3850	3850	3750	3750	0	3650	1000 HEAD
Loss	152	152	150	152	0	100	1000 HEAD
Ending Inventories	10300	10300	10100	10100	0	10000	1000 HEAD
TOTAL DISTRIBUTION	14302	14302	14000	14002	0	13750	1000 HEAD
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0	1000 HEAD
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0	1000 HEAD

Cattle Production Policy

The Turkish government issued another decree (2006/9922) on January 17, 2006 to make some minor amendments to the previous decree (2005/8503 issued in the Official Gazette on February 21, 2005) to support its livestock sector. The main objective of the decree was the same as before only some clarifications were amended to the new decree. The primary objective of the previous decree was to increase inventories, to create jobs and income for producers, and to increase the availability of quality meat at reasonable prices for consumers. The original decree issued in February 2005 can be obtained in the 2005 Livestock and Products Annual Report (TU5034).

Table 1 summarizes the support and premiums provided by the GOVERNMENT to livestock and products producers in 2006.

Table 1. The Amount of Support by Activity in 2006

	Type of Support	Beneficiary	Amount (YTL)/Unit
1	Fodder crop production 1/	Alfalfa Sainfoin One year crops One year crops for silage Corn for Silage Pasture and meadow	1300/hectare 800/hectare 500/hectare 550/hectare 600/hectare 1000/hectare
2	Certified fodder crop seed production	Alfalfa Sainfoin, vetch-Hungarian vetch, fodder beets & fodder turnip Others	1.50/Kg. 0.50/Kg. 0.25/Kg.
3	Breeding heifers	Registered Certified	550/Head 275/Head
4	Artificial Insemination	Less developed regions Others	36/Head 26/Head
5	Milk incentive premium 2/	Producer association members Others	0.055/Liter 0.03/Liter
6	Calves were born through A. I.	Registered Pre registered	140/Head 80/Head
7	Disease Free Producers	Disease free cattle	50/Head
8	Vaccination Support	Firms that vaccinate cattle against Foot & Mouth at least 80 % of the village level Firms that vaccinate cattle against Foot & Mouth less than 80 % of the village level Cattle Brucellosis Anthrax	0.75/Head 0.50/Head 1.00/Head 0.25/Head
9	Milking hygiene and milk quality 3/	Milking parlor and cooling tank Manure ditch	40 %/farm 40 %/farm
10	Protection of Livestock Gene Sources	Large ruminants	325/Head
11	Livestock Identification System	Registration and ear tag	2/Head

1/ Additional 5 % premium for producers use certified and 10 percent additional premium in less developed regions

2/ Members of producer association receive additional YTL 0.015 premium if their cattle are registered

3/ The upper limits are YTL 200,000 (value of the receipt) for milking parlor and YTL 100,000 for the manure ditch (total investment)

[USD 1.00 is currently about YTL 1.45.]

The government decreased the support for the livestock sector in 2006, which was announced as YTL 550 million (about USD 365 million) compared to YTL 622 million (about USD 500 million) in 2005. This amount has not yet been divided into the categories that will be used. The Ministry of Agriculture (MARA) can use this amount as it becomes necessary. MARA officials are stating that this amount is not sufficient and have requested an additional allowance yet it is not yet clear this request will be honored.

Cattle Trade

The Turkish Ministry of Agriculture permits only imports of breeding dairy or beef cattle as well as animal genetics. Only farmers, who have an established farm and need at least 100 head of breeding cattle, can receive permission to import. Turkey imported 967 pregnant heifers from Uruguay in 2005. Imports from Uruguay stopped due to some other health problems after these imports. A group of vets visited Uruguay this spring and had an agreement on new health conditions, thus, breeding cattle imports from Uruguay is again possible now. A total of 1,922 breeding cattle were imported in 2005 from two countries. Of this total, 967 were from Uruguay and 955 were from Sweden. An additional 412 were imported from Sweden last January and February before the BSE incidence, which happened on March 7, 2006, and Turkey stopped breeding cattle imports from Sweden soon after that date.

There are rumors that at least two companies are interested in importing a minimum of 8,000 head of breeding cattle from Uruguay. Even though they are not fully satisfied with the quality of the animals, these companies plan to do so since Uruguay is one of the three countries in the world that Turkey allows imports of live cattle. The other two countries are Australia and New Zealand. The price of pregnant heifers are expected to be significantly lower, somewhere between USD 1,600 CIF – USD 1,900 CIF, which is another reason importers prefer to import from Uruguay. The price of better quality Australian cattle is cited as being about USD 2,900 CIF.

From time to time, Turkish press reports indicate that the government is studying ways to remove the ban on breeding cattle imports from the EU countries; however, there has not yet been any official decision made on this.

Exports of livestock are also generally prohibited. Only slaughtered male or infertile female cattle (weighing at least 225 kilograms for local breeds and 300 kilograms for crossbreeds) may be exported with a license from the Ministry of Agriculture.

Cattle Marketing

There are no specialized beef breeds in Turkey despite an increasing demand for high quality beef. U.S. beef breeds were introduced to Turkey under a Quality Samples Program (QSP) six years ago. Most Turks are familiar with the genetic superiority of the U.S. cattle and growing number of producers are interested in U.S. livestock and genetics. U.S. cattle exporters have been active in promoting sales of U.S. cattle to Turkey in the past. The U.S. Grains Council, the American Soybean Association, and the National Renderers' Association have visited Turkey and organized seminars and training programs to assist the livestock sector.

Cattle Tariff Quotas

The EU and Turkey signed a bilateral agreement in May 1998, under which Turkey would provide the EU access for cattle, beef, and dairy products. The Ministry of Agriculture has continued to refuse to issue import permits for beef for various reasons, including the BSE outbreak in Europe. The EU has retaliated by not honoring its TRQ with Turkey for some products and has created obstacles on other agricultural imports. This issue remains, as one

of the problems that need to be solved before Turkey can progress in the EU membership negotiations.

The official import duties for breeding, feeder, and slaughter cattle, as announced in the 2006 Import Regime, which was the same in the 2005 Import Regime, are as follows:

Tariff Number	Description	Import Duty	Other Information
0102.10	Breeding cattle	0	For all origins
0102.90 (*)	Feeder and slaughter cattle	135 percent of the CIF value	For all origins

(*) However, no permits are issued since feeder and slaughter cattle imports are banned.

Cattle Stocks

The number of cattle, which has been declining in recent decades, is also projected to continue to decline in 2007, but at a slower pace, due to higher consumption compared to production.

Beef and Veal Production

Beef production in 2007 is expected to be about the same as it was in 2006, even though there is a slight decline in the number of cattle slaughtered parallel to the reduced cattle inventories. This is the result of the expected improvement in carcass yields. The beef industry traditionally uses dual-purpose cattle, such as Brown Swiss, most of which are grass fed. Feedlots have not been traditionally utilized in Turkey since most herds are small. However, the number of feedlots has been increasing because high beef prices are attracting investments by particularly large private companies in recent years. Since imports of feeder and slaughter cattle are not allowed, investors must meet their needs with low-quality feeder cattle from the domestic market. It is expected that the demand for higher quality beef breeds will increase given the growth in incomes and tourism.

Nearly all of Turkey's commercial slaughterhouses and packing plants, except one, are either owned privately or by the municipalities. The only public organization is the Meat and Fish Corporation (EBK), which was a major player in the market in the past but now handles less than three percent of production.

Beef and Veal Production Policy

The government announced a support program for meat producers in 2004. Male animals with a minimum 190-kilogram of carcass weight were eligible for the support. The amount of support was first announced as YTL 1 per kilogram of carcass weight, but later this amount was reduced to YTL .5 per kilogram. This support has stopped because the government has not announced any premium since then even though it was announced earlier that support for meat production would continue in between 2005 and 2010.

Beef and Veal Consumption

There is a high rate of migration from rural to the urban areas in Turkey and about two thirds of the population lives in the urban areas now. As a result, meat consumption has shifted from lamb, mutton, and goat to beef, veal and poultry due to changing tastes and costs. Domestic beef consumption decreased in recent years due to reduced animal supply, high rate of inflation, increased beef prices, reduced incomes due to the economic crisis in the near past, and the BSE outbreak in the world. Beef consumption is estimated at nearly 9 kilograms per capita in Turkey.

Total beef consumption is projected to stabilize in 2007, parallel to the production. Since the population is increasing, this implies that there will be further increases in beef prices. The

retail prices of deboned beef are about YTL 15.00 (about USD 10.00) a kilogram, chopped beef are about YTL 17.00 (about USD 11.30) per kilogram, and tender loin and higher grades are YTL 24.00 (about USD 16.00) per kilogram. A year ago, these prices were around YTL 13.00, YTL 16.00, and YTL 22.00, respectively.

The tourism industry is the fastest growing sector in Turkey. Expectations for 2007 and afterwards are even more promising. The economy is also showing signs of growth. As a result, meat prices are expected to continue to increase. Smuggled cattle, which were meeting part of the increased demand, have been taken under control in recent months. However, it is difficult to keep a tight control on this for a long term due to the geographical and political nature on the borders in the east and southeast.

PSD Table for Beef and Veal

Turkey Meat, Beef and Veal							
	2005 USDA Official [Old]	Revised Post Estimate [New]	2006 USDA Official [Old]	Estimate Post Estimate [New]	2007 USDA Official [Old]	Forecast Post Estimate [New]	UOM
Market Year Begin		01/2005		01/2006		01/2007	MM/YYYY
Slaughter (Reference)	3850	3850	3750	3750	0	0	1000 HEAD
Beginning Stocks	38	38	33	33	28	28	1000 MT CWE
Production	620	620	615	615	0	615	1000 MT CWE
Intra EC Imports	0	0	0	0	0	0	1000 MT CWE
Total Imports	0	0	0	0	0	0	1000 MT CWE
TOTAL Imports	0	0	0	0	0	0	1000 MT CWE
TOTAL SUPPLY	658	658	648	648	28	643	1000 MT CWE
Intra EC Exports	0	0	0	0	0	0	1000 MT CWE
Total Exports	0	0	0	0	0	0	1000 MT CWE
TOTAL Exports	0	0	0	0	0	0	1000 MT CWE
Human Dom. Consumption	625	625	620	620	0	620	1000 MT CWE
Other Use, Losses	0	0	0	0	0	0	1000 MT CWE
TOTAL Dom. Consumption	625	625	620	620	0	620	1000 MT CWE
Ending Stocks	33	33	28	28	0	23	1000 MT CWE
TOTAL DISTRIBUTION	658	658	648	648	0	643	1000 MT CWE
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0	1000 MT CWE
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0	1000 MT CWE

The Effect of Avian Influenza on Beef Prices

Turkey had to fight against AI outbreak since last October. The AI outbreak first occurred in the south of the Marmara region. Only one turkey farm was affected. The Ministry of Agriculture and the private poultry sector were well prepared in advance because major

poultry producers were in or around this region. As a result this outbreak did not affect poultry consumption and beef prices significantly.

Turkey had another and much bigger AI outbreak around the New Year. It was spread in many parts of the country this time and lasted longer. Many people stopped consuming poultry, and as a result, poultry consumption dropped immediately by about 90 percent. Some people tried to switch to red meat but most people switched to fish. Red meat prices were increased by about 20 percent during the first month after the outbreak. Increase in the meat prices discouraged consumers and, thus, red meat consumption was decreased back again. During the first three months after the outbreak, starting in mid January, Turkey had an extremely high sea fish production. Farm fish production and this high sea fish production assisted Turkish consumers to obtain their protein needs and kept the red meat prices within logical levels. Turkish people are very fond of picnics and poultry is the most favored food on the picnics. Poultry consumption bounced back with the spring and both poultry and red meat consumption turned totally back to normal levels. Poultry prices, which dropped by about 50 percent during the crisis, also helped red meat prices to not increase any further. As a result, red meat prices are back to normal levels, which are still higher than the prices in the U.S. and EU countries.

Beef and Veal Trade

The government protects its meat and dairy sectors by maintaining non-tariff barriers and very high import duties on meat and dairy products. Turkey has had a ban on imports of meat and meat products since 1996. As a result, no regulation exists on meat and meat products imports. Turkey does not issue import licenses (control certificates) for these products. The Trade Matrix was not provided since there was no beef and veal trade in MY 2005 and during the first five months in 2006.

Beef Tariff Quota

The EU and Turkey implemented a bilateral agreement in May 1998, under which Turkey would provide the EU access for beef, and dairy products. Under the agreement, Turkey granted the European Union a 19,000 MT beef tariff rate quota at an eventual duty of 42 percent, and small tariff rate quotas for various dairy products. However, the Ministry of Agriculture has refused to issue import permits for various reasons, including the BSE outbreak in Europe. The EU has retaliated by not honoring its TRQ with Turkey for tomato paste and has created obstacles on other agricultural imports. This issue is one of the many that will need to be resolved before EU membership negotiations progress.

The official import duties for fresh, chilled, or frozen beef, as announced in the 2005 Import Regime, which was the same in the 2005 Import Regime, follow:

Tariff Number	Description	Import Duty	Other Information
0201 & 0202 (*)	Fresh, chilled, or frozen bovine meat	225 % of the CIF value	For all origins

(*) However, no permits are issued since all meat imports are banned.

Beef and Veal Stocks

Official beef and veal stock data are not available. Beef and veal stock levels are limited because of Turkish preference for fresh meat.

Livestock Genetics

Turkish livestock sector has been depressed and, as a result, inventories have decreased significantly in Turkey in recent decades. Turkey has been unable to upgrade its inventories

due to its economic crisis and the BSE problems in Europe. These developments underlined the importance of livestock genetics for Turkey in recent years.

The government is now trying to support the livestock sector by providing financial assistance. Turkey's livestock genetics imports increased significantly due to the ban on imports of live animals and the growing needs and intentions to invest in the livestock sector. American exporters hold about 25 percent of the market share since Turkish breeders are aware of the high quality of the American bovine semen. EU exporters are more aggressive and their prices and locations are more acceptable.

Exporting genetics to Turkey is a rather difficult and time-consuming process since two authorities of the Ministry of Agriculture are involved. The Turkish livestock market provides many opportunities but also challenges for US bovine genetic importers. Please see the voluntary report on livestock genetics (TU6030) for detailed information on trade figures and trade challenges.

Detailed trade through 2005 was also provided in the same report. Turkey has not imported any embryos during the first five months (January – May) in 2006. However, Turkey imported nearly 700,000 doses of semen worth of nearly USD 1.4 million during the same period. The following table provides the details of semen imports.

Turkey's Semen Imports in 2006 (Jan.-May)

Country	Unit (Doses)	Value (USD)
United States	87,635	328,022
Germany	306,280	474,356
Netherlands	85,449	193,989
United Kingdom	35,740	73,153
Canada	55,650	107,783
Austria	13,220	14,578
Denmark	25,000	33,811
France	5,000	8,401
Sweden	2,000	13,042
Spain	30,000	50,789
Italy	20,022	55,097
Slovakia	19,165	32,976
Total	685,161	1,385,997

Tallow

Turkey is a major importer of tallow, primarily for soap production. Turkey has four times larger soap production capacity than it needs. About two-thirds of Turkey's soap production is exported. The United States has been the number one supplier for a number of years. Tallow exports to Turkey were affected adversely after the BSE incidents in the United States, especially after the second case of BSE in Texas. Turkish soap industry solved the problem by persuading the Ministry of Agriculture and Ministry of Health officials that tallow is processed under certain pressure and at very high temperature so that it is no longer harmful for soap users.

Tariff rate on tallow imports is four percent. However, soap producers are receiving this amount back after they document that they consumed all of the tallow imported for

producing soap. Turkish tallow imports for 2005 and first five months in 2006 are provided in the following table.

Turkey's Tallow Imports

Country	2005 (Jan. – Dec.)		2006 (Jan. – May)	
	Quantity (MT)	Value (USD)	Quantity (MT)	Value (USD)
United States	138,837	68,041,188	43,599	20,811,619
Netherlands			500	234,726
Uruguay			45	21,654
Germany	37	40,365	24	24,414
Total	138,874	68,081,553	44,168	21,092,413